

USDA Weekly Retail Turkey Feature Activity

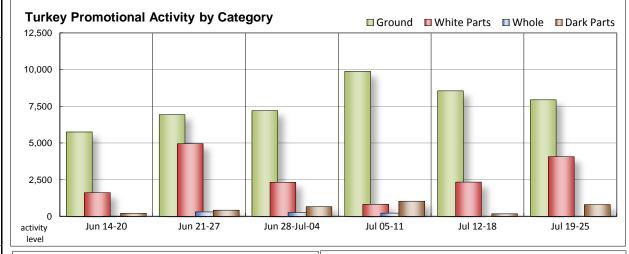
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 07/19 thru 07/25.

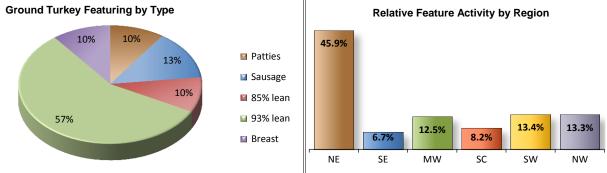
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY													
THIS WEEK LAST WEEK LAST YEAR													
Feature Rate 1/		of 23,200		of 23,200	46.7% of 22,500								
		tlets		tlets	outlets								
Special Rate 4/		0%		.4%	3.0%								
Activity Index 2/ 3/		,080 Wtd Avg		,400 Wtd Avg	16,910 Stores Wtd Avg								
WHOLE BIRDS:	Stores	wta Avg	Stores	wta Avg	Stores	vvia Avg							
Fresh - Hens					70	1.76							
" - Toms					10	1.70							
Frozen - Hens					100	1.00							
" - Toms					100	1.00							
PARTS:					100	1.00							
Breast:													
Bone-in, whole													
Fresh	20	2.49	30	2.59	20	2.56							
Frozen	810	-	180		2,240	1.17							
Split, bone-in					, -								
Fresh	250	2.99			160	2.99							
Rotisserie	840	7.49	610	7.57	350	7.88							
Boneless, whole	180	4.99	90	5.36	630	4.06							
Cutlets	830	4.25	570	5.14	940	4.41							
Cutlets, thin sliced			100		10	4.99							
Strips	170	4.99	300	4.81									
Tenders	970	4.44	460	4.75	610	4.03							
Marinated Tenders	400	4.82	1,430	4.31	620	4.11							
Drumsticks	290	1.95	10	1.29	150	1.87							
Thighs	180	1.99			110	1.85							
Wings	300	1.98	20	1.74	50	1.50							
Necks	10	1.39	10	1.29	10	1.29							
Smoked Drumsticks	10	1.89	50	1.95	10	2.49							
Smoked Wings	10	1.89	50	1.95	10	2.10							
Smoked Necks	10	1.89	40	1.94									
GROUND TURKEY:	7,940		8,550		9,300	3.10							
Patties	770		1,310		910	3.42							
Sausage	1,070		1,780		1,190	3.19							
85% lean	760	-	1,440		710	2.22							
93% lean	4,510		2,390		5,970	3.04							
Breast	830		1,630		520	4.41							
Rolls (frsh/frz 1 lb.)	260	2.43	260	2.49	40	1.74							
Specialty ^{5/}	400	4.00	00	0.00	200	4.07							
Patties	180		90		300	4.07							
93-94% lean	390			-	560	4.37							
Breast Note: rolls & specialty no	30		60		510	6.43							
riole. Iolis & Specially 10	n included	in ground	turkey tota	ai ailu welgi	neu avela	ye.							

This Week's Turkey Feature Highlights

Going into the latter part of the month, turkey features continue to slow. Whole turkeys remain invisible. Both offerings and prices for bone-in breasts increase. You can avoid the heat of cooking this week by bringing home a rotisserie breast; offers increase, prices decrease. Cutlets and tenders are viewed more often at lower average prices. Marinated tenders are considerably less visible after last week: prices are higher. Dark parts gain momentum. You will pay more for fresh parts but smoked values are lower. Ground turkey features slow again but there are plenty of opportunities to fire up the grill. 93% lean accounts for over half the feature activity. Prices for chubs are lower, patties steady, and the balance of grinds higher. Deli feature activity increases with a larger volume of offerings on thin slicing meats and self-service items. Prices increase for turkey ham, pastrami, and private label thick slicing meats. The balance of turkey service and self-service deli items decline in price.





All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising <u>any</u> reported turkey item during the current week, expressed as a percentage of the total sample. 2/ Activity Index: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). 3/ Stores/Avg: the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/ Special Rate: the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.) 5/ Specialty: products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.



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Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 07/19 thru 07/25.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	NORTI	HEAST U.S.			SOUTHEAST U.S.		MIDV	MIDWEST U.S.			
	(CT,DE,MA,MD,M	E,NH,NJ,NY,PA,F	RI,VT)	(AL,FL,	GA,MS,NC,SC,TN,V	4,WV)	(IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI) 33.8% of 4,200 sampled outlets 7.6% of stores w/ no-price promotions Activity Index = 1,860				
Feature Rate ^{1/} Special Rate ^{4/} Activity Index ^{2/}	0.0% of stores w Activity	Index = 7,490	tions	0.0% of st A	of 6,100 sampled ou ores w/ no-price pro ctivity Index = 1,480	omotions					
	Price Range (\$/pound)	Summary Stores V	/ /td Avg	Price Rang (\$/pound)	e Sumi Stores	mary Wtd Avg	Price Range (\$/pound)	Summar Stores V	ry Vtd Avg		
WHOLE BIRDS:											
Fresh - Hens											
" - Toms											
Frozen - Hens											
" - Toms											
PARTS:											
Breast:											
Bone-in, whole											
Fresh											
Frozen	1.79	170	1.79	1.17 - 1.59	9 120	1.48	0.99 - 1.99	280	1.60		
Split, bone-in											
Fresh	2.99	250	2.99								
Rotisserie	5.00 - 9.99	490	7.56	7.99	9 110	7.99	6.99 - 8.99	100	7.31		
Boneless, whole	4.99	180	4.99								
Cutlets	3.99 - 4.99	750	4.27	3.99 - 4.59	9 80	4.13					
Cutlets, thin sliced											
Strips	4.99	170	4.99								
Tenders	3.99 - 5.49	870	4.48	3.99 - 4.49	9 80	4.06					
Marinated Tenders	4.79 - 5.33	210	5.24	4.60	5 110	4.66	4.53	20	4.53		
Drumsticks				1.19	9 10	1.19	1.39 - 1.99	100	1.96		
Thighs											
Wings	2.49	10	2.49				1.39 - 1.99	110	1.91		
Necks							1.39	10	1.39		
Smoked Drumsticks				1.89	9 10	1.89					
Smoked Wings				1.89							
Smoked Necks				1.89	9 10	1.89					
GROUND TURKEY:											
Patties	2.99 - 3.59	480	3.13	2.99			3.49 - 3.69	180	3.51		
Sausage	2.99 - 4.09	770	3.63	2.99 - 3.50			2.86 - 3.69	220	2.98		
85% lean	2.33 - 3.00	460	2.74	2.49 - 2.50			1.99 - 2.50	20	2.21		
93% lean	2.53 - 3.99	1,440	3.29	2.90 - 3.99			2.50 - 3.99	660	2.95		
Breast (99-100% lean)	3.99 - 5.38	660	4.99	4.10			4.00 0.00	110	0.40		
Rolls (frsh/frz 1 lb.)				2.25	5 50	2.25	1.69 - 2.66	140	2.49		
Specialty 5/	4.00 4.00	400	4.00								
Patties	4.29 - 4.99	180	4.36				4.40	00	4 40		
93-94% lean Breast	4.49 - 4.99 6.99	370 30	4.67 6.99				4.49	20	4.49		
Course UCDA Acricultural	0.99	30	0.33	Nove (515) 204 (TOTAL AND COME OF A DESIGNATION OF A DES	-tNaDaga	0 -6		



Fri. Jul 19, 2013

USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 07/19 thru 07/25.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	SOUTH C	ENTRAL U.S.		SOUTHWEST U.S.						NORTHWEST U.S.			
	(AR,AZ,CO,KS,L	(CA,HI,NV) 34.3% of 2,900 sampled outlets						(AK,ID,MT,OR,WA,WY)					
Feature Rate 1/	30.9% of 4,20							43.8% of 1,200 sampled outlets					
Special Rate 4/	3.8% of stores w	0.0% of stores w/ no-price promotions					0.0% of stores w/ no-price promotions						
Activity Index 2/		Index = 1,220		Activity Index = 1,440					Activity Index = 590				
	Price Range	Summar	у		Range	Summary		Price Range		Sumi	Summary		
	(\$/pound)	Stores V	Vtd Avg	(\$/p	ound)	Store	s V	/td Avg	(\$/p	oound)	Stores	Wtd Avg	
WHOLE BIRDS:													
Fresh - Hens													
" - Toms													
Frozen - Hens													
" - Toms													
PARTS:													
Breast:													
Bone-in, whole													
Fresh	2.49	20	2.49										
Frozen	1.37 - 1.79	240	1.64										
Split, bone-in													
Fresh													
Rotisserie	6.99	120	6.99							6.99	20	6.99	
Boneless, whole													
Cutlets													
Cutlets, thin sliced													
Strips													
Tenders	4.00	20	4.00										
Marinated Tenders	4.00	20	4.00						3 33	- 3.99	60	3.76	
Drumsticks					1.99		180	1.99	3.33	- 3.99	00	3.70	
Thighs					1.99		180	1.99					
Wings					1.99		180	1.99					
Necks					1.33		100	1.99					
Smoked Drumsticks													
Smoked Wings													
Smoked Necks													
GROUND TURKEY:													
Patties	2.79 - 3.49	30	3.12	3.49	- 3.99		30	3.76		3.49	10	3.49	
Sausage	2.70 0.10		02		- 4.69		40	4.18		00		00	
85% lean	2.67 - 2.79	50	2.75		- 3.19		30	2.82		2.79	10	2.79	
93% lean	3.19 - 3.99	550	3.49		- 3.99		790	3.23	3.10	- 3.99	470		
Breast (99-100% lean)	4.39 - 5.19	130	5.12	5					30	4.39	20		
Rolls (frsh/frz 1 lb.)	1.50 - 2.99	60	2.48		2.25		10	2.25					
Specialty 5/			-		· · · · · · · · · · · · · · · · · · ·			-					
Patties													
93-94% lean													
Breast													



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Jul 19, 2013

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 07/19 thru 07/25.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	N	ATIONAL	SUMMAR	RY			NORTHEA	NORTHEAST U.S.		SOUTHEAST U.S.			
	This	Week	Last	Week	Last	Year	(CT,DE,MA,MD,ME,N	H,NJ,NY,PA,RI,VT)	(AL,FL,GA,MS,N	(AL,FL,GA,MS,NC,SC,TN,VA,WV)			
1/	75.6% o	f 23,200	72.5% o	f 23,200	66.6% o	f 22,500	7						
Feature Rate 1/	sto	res	sto	res	sto	res	91.0% of 4,600 sa	ampled outlets	78.8% of 6,100	78.8% of 6,100 sampled outlets			
Activity Index 2/	47	000	44	640	46	040	Activity Inde	x = 13,430	Activity Inc	dex = 12,180			
Activity Index 2/	47,	000	44,	640	40,	040	Price Range	Summary	Price Range	Summary			
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	g (\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg			
SERVICE DELI - Turkey													
Category 1													
Processor Brand	2,830	8.06	6,520	8.18	4,550	8.11		1,120 8.17	6.99 - 8.99	800	8.56		
Private Brand	1,340	7.97	740	7.46	3,680	7.37	6.99 - 8.99	900 7.94	7.49	110	7.49		
Category 2													
Processor Brand	5,880	5.80	3,890	5.94	4,740	6.43		2,070 5.76	4.99 - 6.99	1,060	6.13		
Private Brand	3,570	7.02	4,680	7.26	3,830	6.36	5.99 - 7.99	940 6.59	4.99 - 7.99	500	6.53		
Category 3													
Processor Brand	1,030	3.82	1,870	4.02	1,870	4.05		490 4.00	4.99	10	4.99		
Private Brand	1,300	4.99	80	5.48	2,690	5.19	9 4.98 - 4.99	150 4.99	4.99	1,140	4.99		
Turkey Ham													
Processor Brand	410	3.78	670	3.46	490	3.50		240 4.08	3.99	70	3.99		
Private Brand	40	4.48			110	3.99	9 4.48	40 4.48					
Turkey Pastrami													
Processor Brand	330	4.28	320	4.24	350	3.85	3.79 - 4.99	180 4.29	4.99	30	4.99		
Private Brand													
SERVICE DELI - Chicken													
Category 1													
Processor Brand	2,600	7.60	3,120	7.28	3,020	7.32	6.99 - 9.99	1,270 8.00	6.49 - 8.99	190	8.22		
Private Brand	770	7.11	760	7.72	790	7.02	6.99 - 7.99	470 7.52					
Category 2													
Processor Brand	210	5.85	140	5.38	360	5.70	5.88 - 6.99	50 6.49					
Private Brand	1,430	5.02	140	5.99	260	5.15	4.99	110 4.99	4.99	1,140	4.99		
SELF-SERVICE DELI													
(dollars per tub or pouch)													
Turkey 7-10 oz													
Processor Brand	5,580	3.05	6,540	3.08	7,260	3.20		1,990 3.44	1.99 - 3.49	1,240	2.97		
Private Brand	6,590	3.07	2,650	3.55	1,890	3.03	2.50 - 2.99	370 2.61	2.50 - 3.33	1,800	3.07		
Turkey 16 oz											1		
Processor Brand	2,520	4.95	3,630	5.06	1,920	5.05	3.99 - 4.99	1,040 4.91	3.98 - 4.99	1,160	4.98		
Private Brand													
Chicken 7-10 oz													
Processor Brand	4,870	3.03	6,320	3.09	6,340	3.14		1,630 3.43	1.99 - 3.49	1,130	3.01		
Private Brand	6,580	3.07	2,570	3.57	1,890	3.03	3 2.50 - 2.99	370 2.61	2.50 - 3.33	1,800	3.07		

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)





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Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 07/19 thru 07/25.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	MIDWI	EST U.S.	SOUTH C	ENTRAL U.S.	SOUTHWEST U.S.	NORTHWEST U.S.			
	(IA,IL,IN,KY,MI,MI	N,ND,NE,OH,SD,WI)	(AR,AZ,CO,KS,L/	A,MO,NM,OK,TX,UT)	(CA,HI,NV)	(AK,ID,MT,OR,WA,WY)			
Feature Rate 1/									
- reature Nate		sampled outlets	*	sampled outlets	62.7% of 2,900 sampled outlets	66.5% of 1,200 sampled outlets			
Activity Index 2/		Activity Index = 9,810		ndex = 6,340	Activity Index = 4,740	Activity Index = 1,380			
	Price Range Summary		Price Range	Summary	Price Range Summary	Price Range Summary			
SERVICE DELI - Turkey	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound) Stores Wtd Avg	(\$/pound) Stores Wtd Avg			
Category 1									
Processor Brand	6.49 - 8.99	640 7.01	6.49 - 10.99	170 7.92	7.99 - 8.99 10 8.49	7.99 - 12.99 90 10.00			
Private Brand	6.99 - 10.99	250 8.47	6.99 - 7.99	70 7.32	7.99 10 7.99	7.33 - 12.33			
Category 2	0.00 10.00	200 0.47	0.00 7.00	70 7.02	7.55				
Processor Brand	4.98 - 6.99	1,270 5.64	4.48 - 5.49	900 5.84	4.99 - 5.99 540 5.68	4.98 40 4.98			
Private Brand	4.99 - 7.99	500 6.25	5.99 - 7.99	490 7.43	6.99 - 7.99 810 7.67	7.99 330 7.99			
Category 3									
Processor Brand	2.98 - 4.49	390 3.52	3.49 - 4.49	110 3.93		3.98 - 3.99 30 3.99			
Private Brand	4.99	10 4.99							
Turkey Ham									
Processor Brand	2.98 - 2.99	30 2.99	2.99	10 2.99	2.79 - 2.99 60 2.91				
Private Brand									
Turkey Pastrami									
Processor Brand	2.98 - 5.99	40 4.54	4.97	30 4.97	2.99 40 2.99	3.99 10 3.99			
Private Brand									
SERVICE DELI - Chicken									
Category 1									
Processor Brand	5.49 - 9.99	680 6.66	5.99 - 8.99	230 7.13	6.99 - 9.99 20 8.22	7.99 - 10.99 210 8.12			
Private Brand	5.99 - 7.99	280 6.37	7.99	20 7.99					
Category 2									
Processor Brand	4.29 - 5.99	160 5.65							
Private Brand	4.99 - 5.99	60 5.82	4.99	120 4.99					
SELF-SERVICE DELI									
(dollars per tub or pouch)									
Turkey 7-10 oz Processor Brand	2.00 - 3.99	850 2.88	1.99 - 2.50	880 2.62	1.99 - 3.69 530 2.72	2.69 - 3.58 90 3.03			
Private Brand	2.50 - 3.99	1,790 2.86	2.50 - 3.00	1,290 3.33	2.50 - 3.99 1,100 3.24	2.50 - 3.58 90 3.03			
Turkey 16 oz	2.50 - 5.99	1,790 2.00	2.30 - 3.00	1,290 3.33	2.50 - 3.99 1,100 3.24	2.50 - 3.99 240 3.16			
Processor Brand	4.99	280 4.99	4.99	30 4.99		4.49 10 4.49			
Private Brand	4.55	200 4.00	4.00	4.55		1.40			
Chicken 7-10 oz									
Processor Brand	2.00 - 3.99	790 2.88	1.99 - 2.50	710 2.54	1.99 - 3.69 520 2.73	2.69 - 3.58 90 3.03			
Private Brand	2.50 - 3.99	1,790 2.86	2.50 - 3.00	1,280 3.33	2.50 - 3.99 1,100 3.24	2.50 - 3.99 240 3.18			

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)